

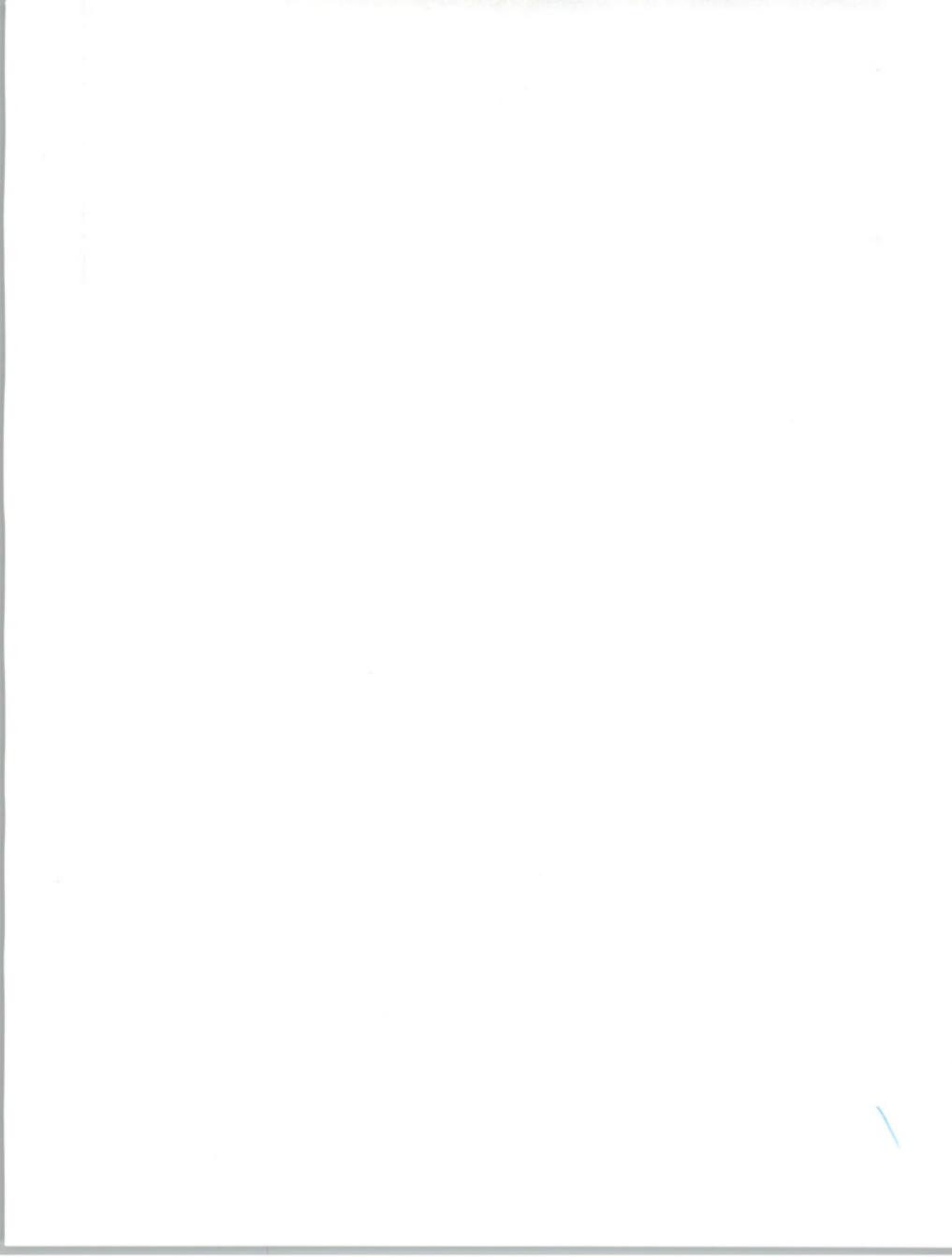
Outsourcing:
Quelle Dynamique de
Croissance Sur le Marché?

Outsourcing:
Market Trends

Conférence INPUT
Paris - 19 Octobre 1993

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Prepared by
INPUT
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***Outsourcing: Quelle Dynamique de Croissance
Sur le Marché?***

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Outsourcing: Quelle Dynamique de Croissance Sur le Marché?

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L' "Outsourcing"

Contours actuels et futurs du marché

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Directeur d'INPUT

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L' Outsourcing

- Evolution de l'outsourcing
- Nouvelles niches

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L' Outsourcing

consiste à recourir à un prestataire externe pour opérer tout ou partie d'un système d'information

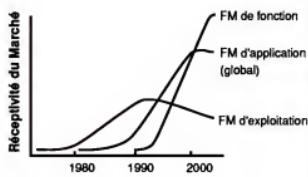
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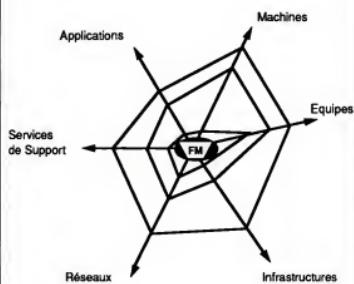
Les Différentes Phases de L' Outsourcing



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L' Outsourcing: Un Concept à "Géométrie Variable"



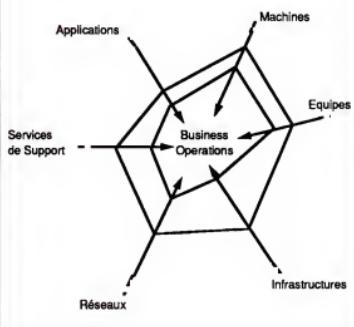
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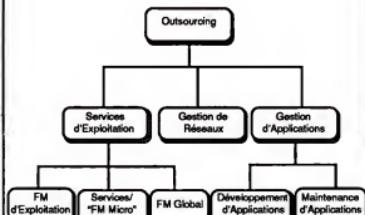
Notes

Outsourcing Demain Vers le "Business Operations" (FM de Fonction)



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Les Formes de L' Outsourcing Selon INPUT



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Notes

Les Nouvelles Niches

- Le "FM de transition" - Transition management
- Les "Services/FM micro" - Desktop services
- Le "FM de fonction" - Business operations

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Le FM de Transition

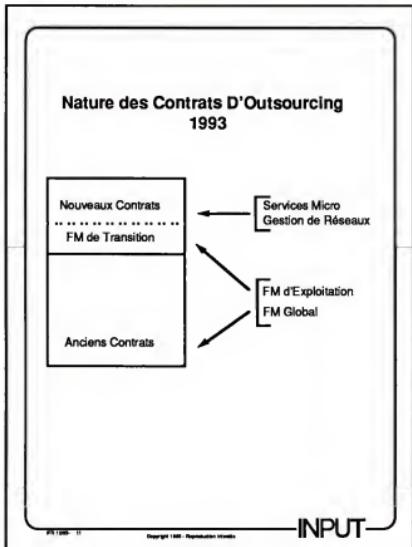
- Prestataire = vecteur du changement
- Transition complexe
- Transition longue
- Maintenir en parallèle deux environnements

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Notes

Les Services Micros

Caractéristiques des Prestations

Types de Services	Nature des Prestations
Support Logistique	Financement Installation Maintenance Gestion de Parcs
Support Utilisateur	Hotline Formation

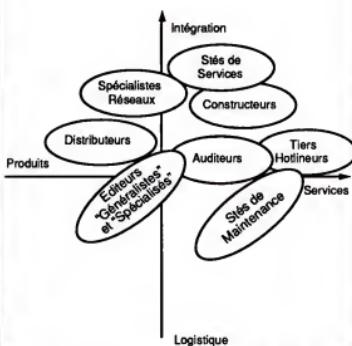
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Les Services Micros

Positionnement des Catégories de Fournisseurs sur le Marché



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Notes

Business Operations

Définition du "FM de Fonction"

Prise en charge par un prestataire externe d'une fonction essentielle de l'entreprise et du système d'information correspondant

- Système de Facturation
- Service Client
- Gestion des documents
- Traitement des réclamations

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Business Operations - "FM de Fonction"

Caractéristiques des fonctions à privilégier

- Communes à plusieurs entreprises
- A dominante humaine
- A forte teneur technologique
- Activité fluctuante

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Conclusion

Stratégies d'Outsourcing

Actuelles

- Economies
- Amélioration du service

Nouvelles

- Vecteur du changement
- Stratégie d'entreprise

- Transition

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Outsourcing Market Trends

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Outsourcing Current and future market outline

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Outsourcing

- Outsourcing evolution
- New niches

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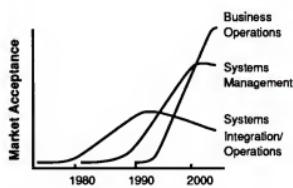
Outsourcing
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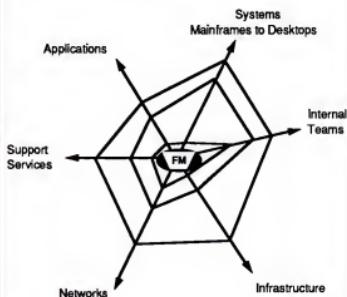
Outsourcing Market Waves



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Outsourcing: A Swing-Wing Concept

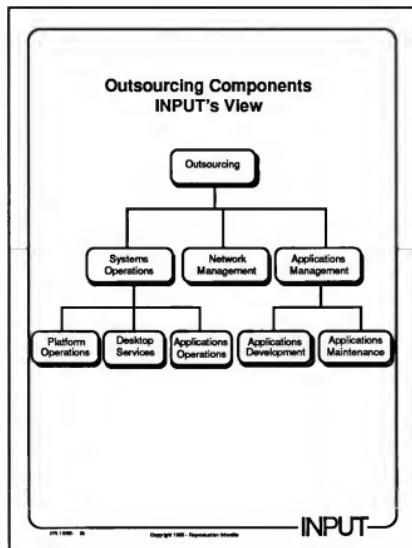
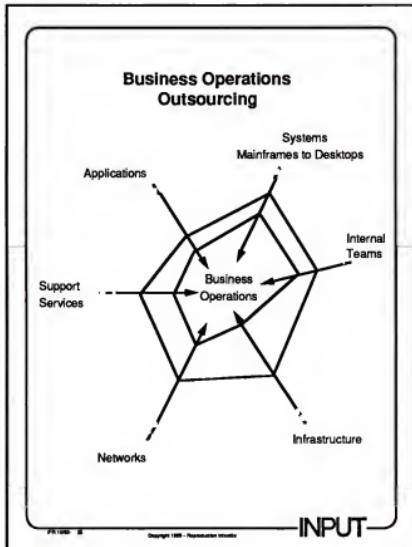


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Notes



Notes

New Niches

- Transition management
- Desktop services
- Business operations

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Transition Management

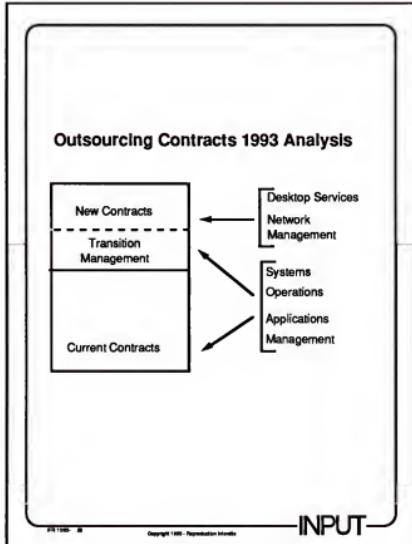
- Requires outsourcer as agent of change
- Transition difficult to accomplish
- Transition takes time
- Dual operational environments required

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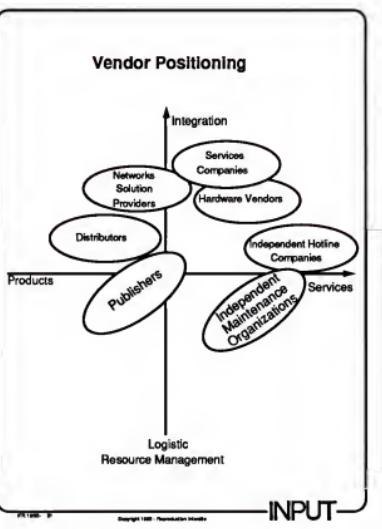
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Notes



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Notes



“Business Operations”

Definition

Turning over key business functions and related processes including information systems to outside companies

- Billing operations
- Customer service
- Document management
- Customer claims management

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Notes

Business Operations Outsourcing

Key candidates characteristics

- Labor-intensive
- High technology content
- Common to client's industry
- Periodic peak processing required

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Conclusions

Outsourcing Strategies

Current	New
• Economic strategies	• Change agent
• Service enhancement	• Business strategy
• Transition	

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- **EDI/Electronic Commerce**
- **U.S. Federal Government IT Markets**
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SERVICE FEATURES

Research-based reports on trends, etc.
(Over 100 in-depth reports a year)

Frequent bulletins on events, issues, etc.

5-year market forecasts

Competitive analysis

Access to experienced consultants

Immediate answers to questions

DATA BASES

- **Software and Services Market Forecasts**
- **Software and Services Vendors**
- **U.S. Federal Government**
 - Procurement Plans (PAR)
 - Forecasts
 - Awards (FAIT)
- **Commercial Application LEADS**

CUSTOM PROJECTS

For Vendors—analyse:

- **Market strategies**
- **Product/service opportunities**
- **Customer satisfaction levels**
- **Competitive position**
- **Acquisition targets**

For Buyers—evaluate:

- **Specific vendors**
- **Outsourcing options**
- **Market opportunities**
- **Systems plans**
- **Peer position**

OTHER SERVICES

Presentations to user groups, planning meetings, etc.

Acquisition/partnership searches

Newsletters

INPUT WORLDWIDE

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Sudetenstraße 9
D-35428 Langgöns-
Niederkleen
Germany

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London W1X 7FB
England
Tel. +44 (0) 71 493-9335
Fax +44 (0) 71 629-0179

New York

400 Frank W. Burr Blvd.
Teaneck, NJ 07666
U.S.A.
Tel. 1 (201) 801-0050
Fax 1 (201) 801-0441

Paris

24, avenue du Recteur
Poincaré
75016 Paris
France
Tel. +33 (1) 46 47 65 65
Fax +33 (1) 46 47 69 50

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1881 Landings Drive
Mountain View
CA 94043-0848
U.S.A.

Tel. 1 (415) 961-3300
Fax 1 (415) 961-3966

Tokyo

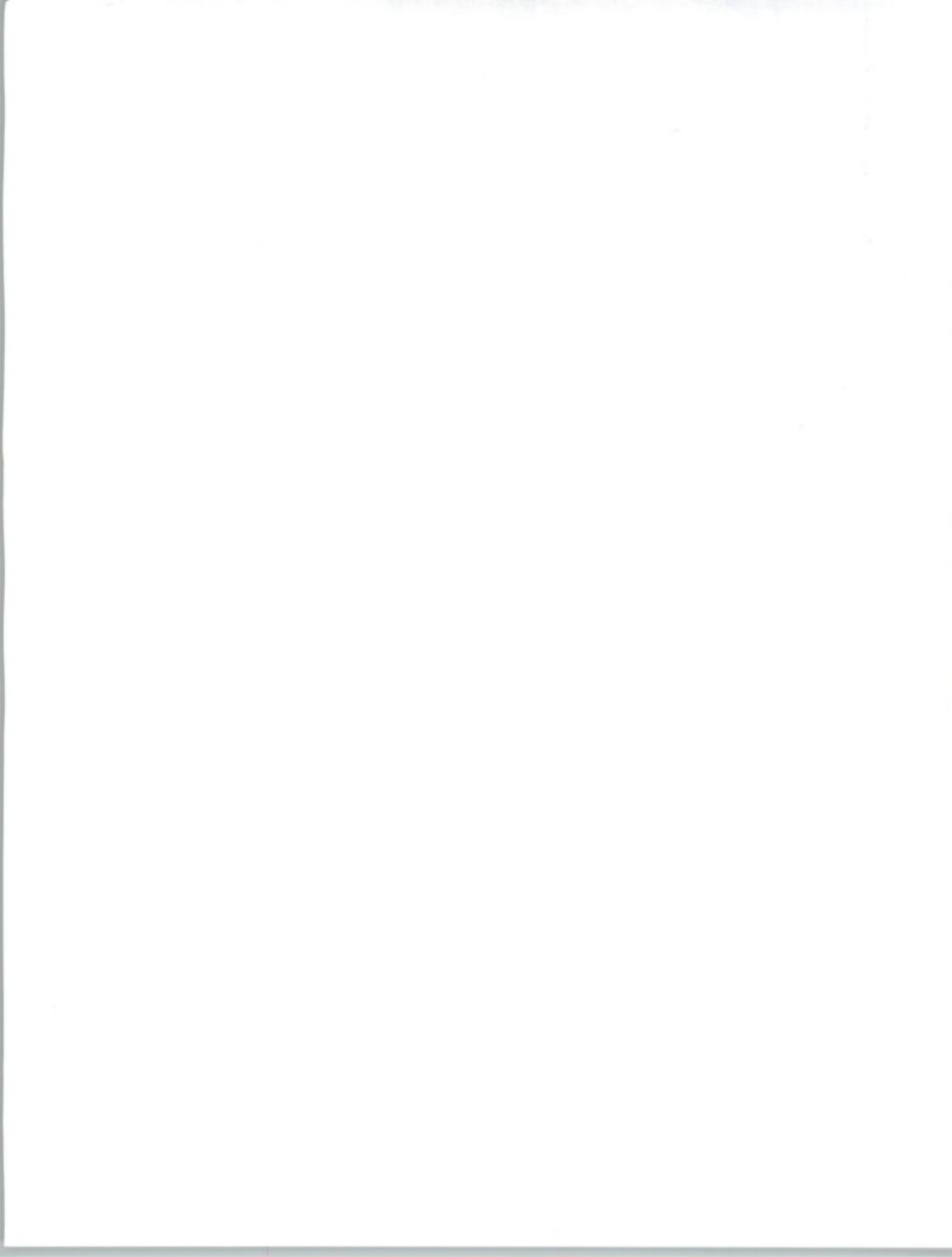
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Chiyoda-ku, Tokyo 101
Japan
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Fax +81 3 3864-4114

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1953 Gallows Road
Suite 560
Vienna, VA 22182
U.S.A.
Tel. 1 (703) 847-6870
Fax 1 (703) 847-6872

2°

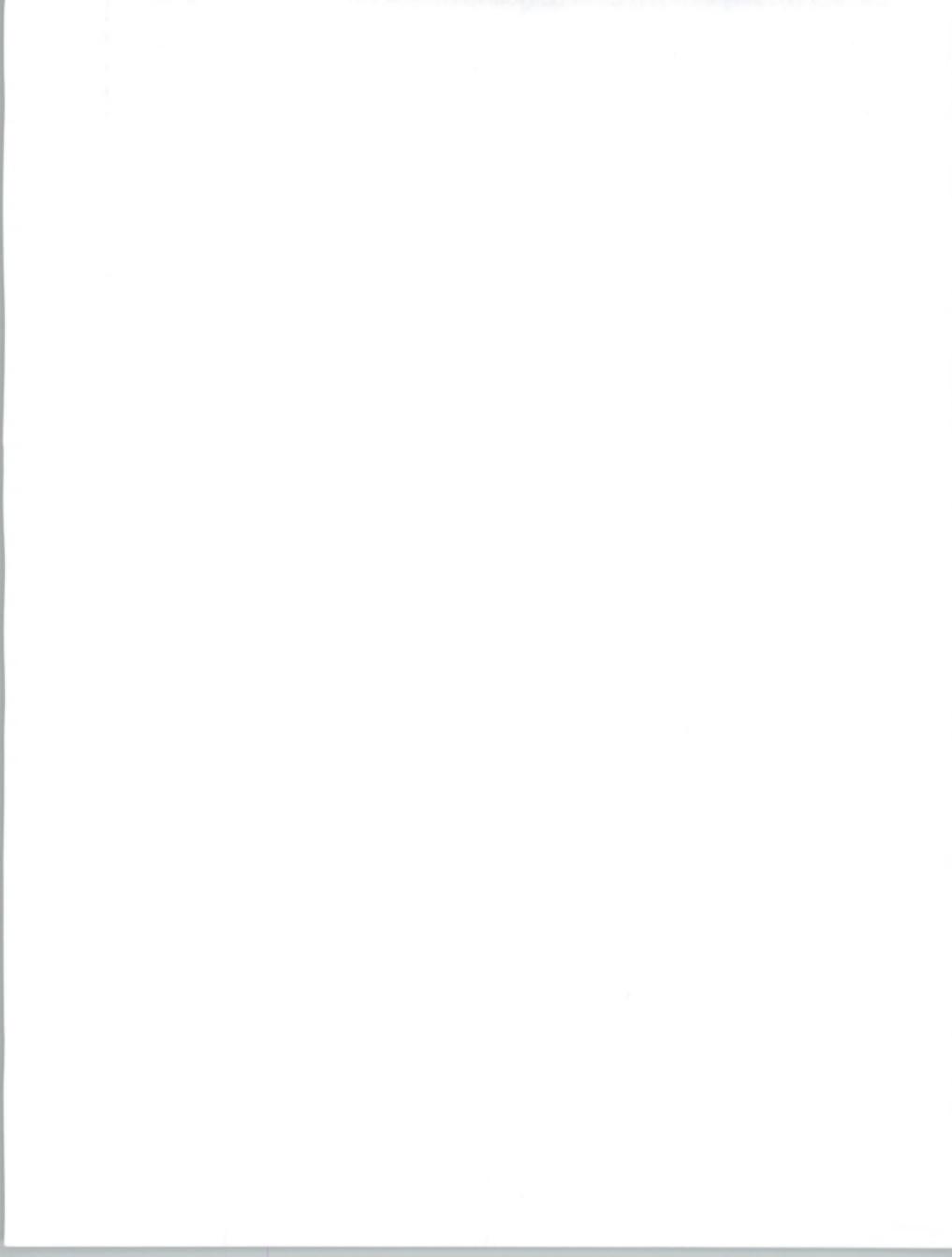
Outsourcing: Quelle Dynamique de Croissance Sur le Marché?



L' "Outsourcing"

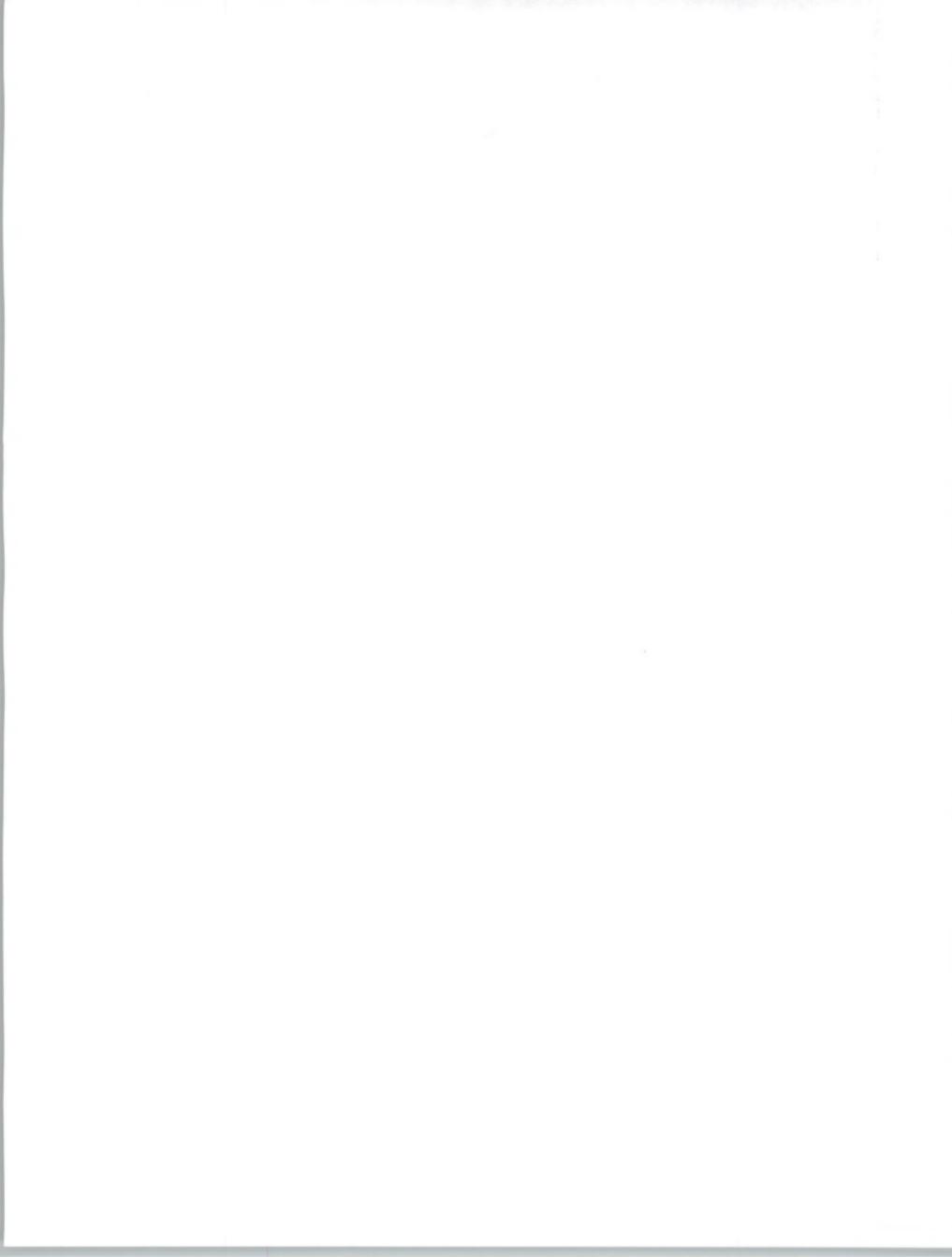
Contours actuels et futurs du marché

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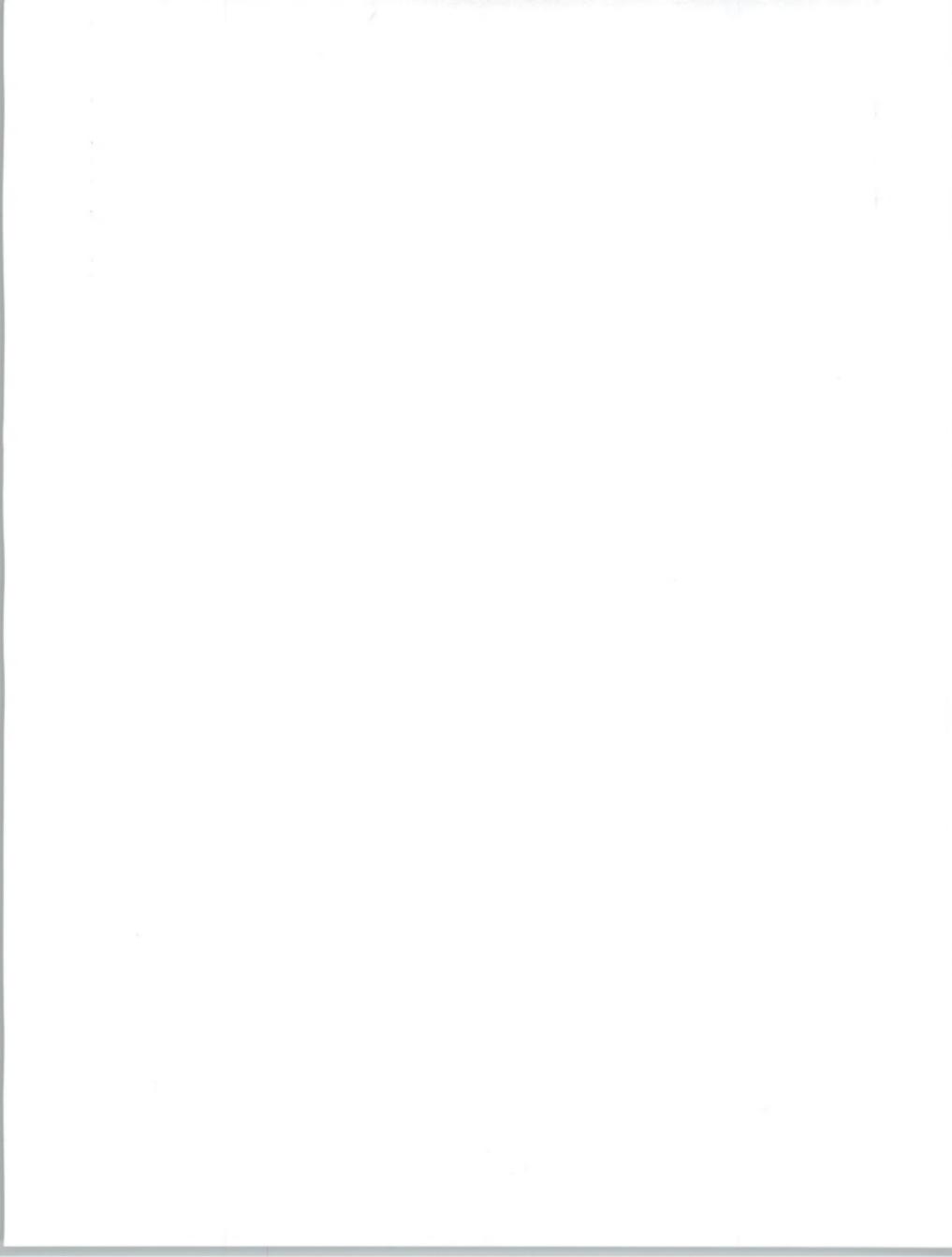


L' Outsourcing

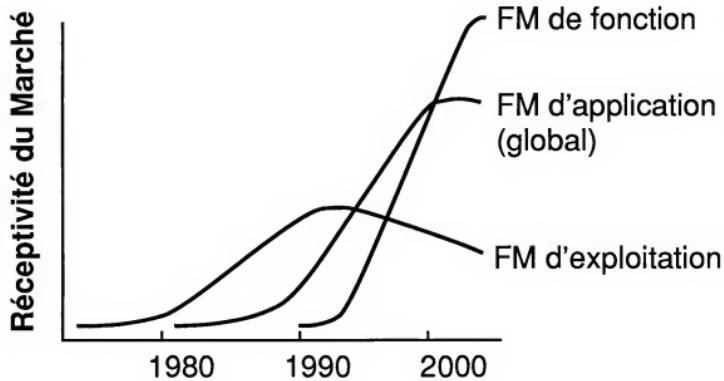
- Evolution de l'outsourcing
- Nouvelles niches

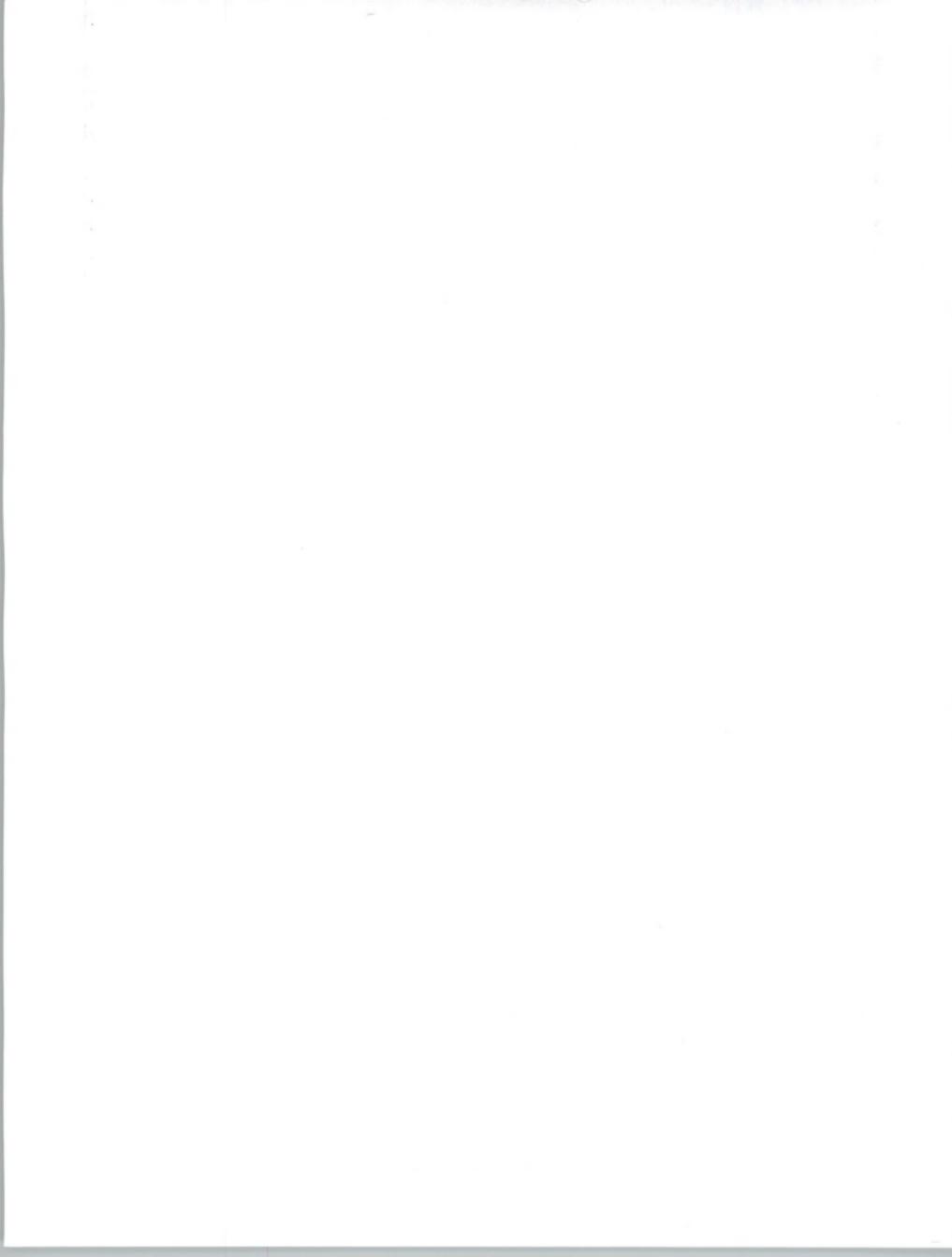


**L' Outsourcing
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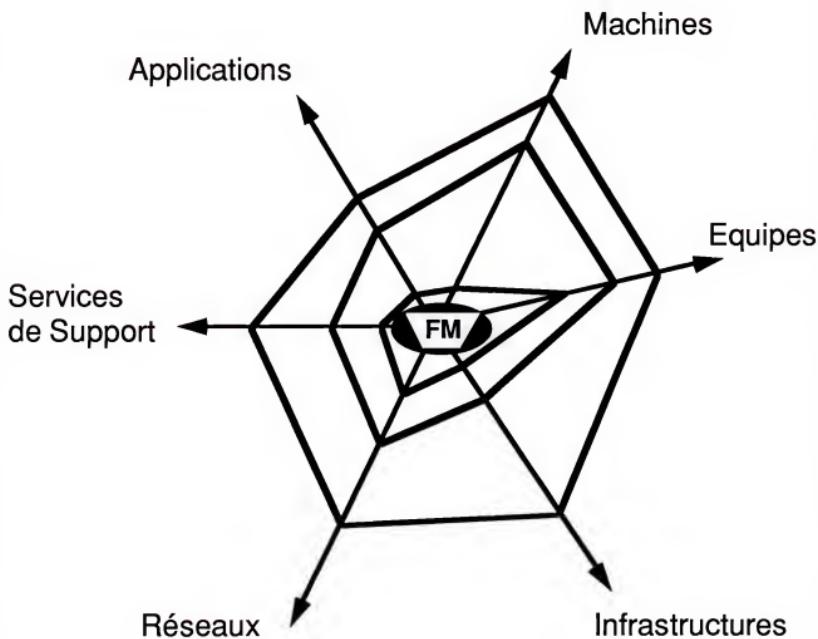


Les Différentes Phases de L' Outsourcing



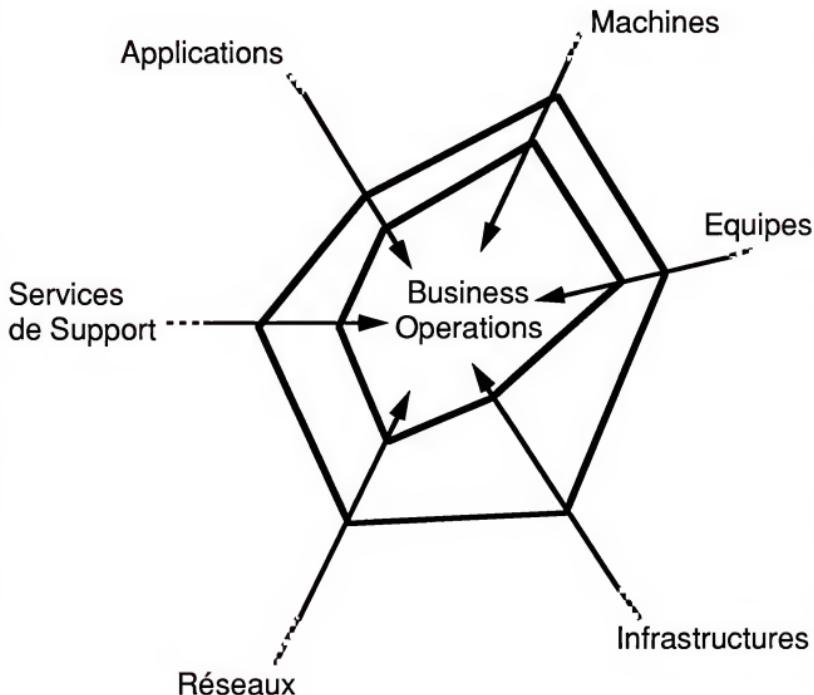


L' Outsourcing: Un Concept à “Géométrie Variable”



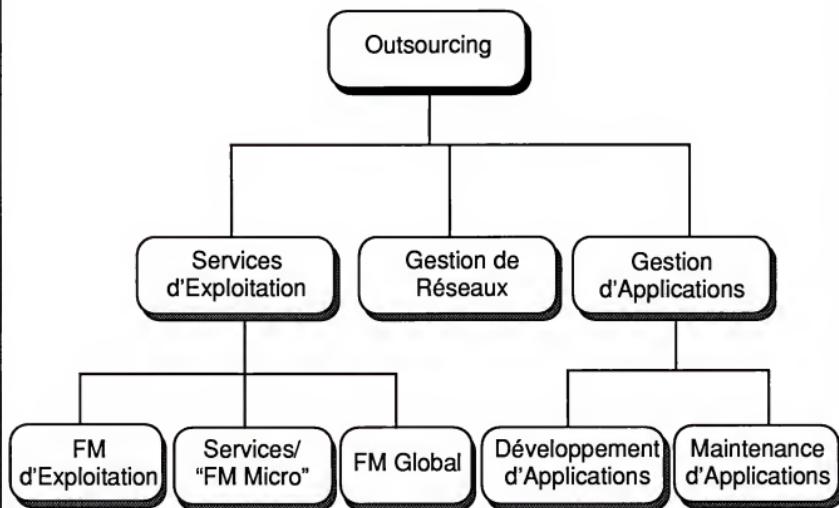


Outsourcing Demain Vers le "Business Operations" (FM de Fonction)





Les Formes de L' Outsourcing Selon INPUT



Les Nouvelles Niches

- Le “FM de transition” - Transition management
- Les “Services/FM micro” - Desktop services
- Le “FM de fonction” - Business operations

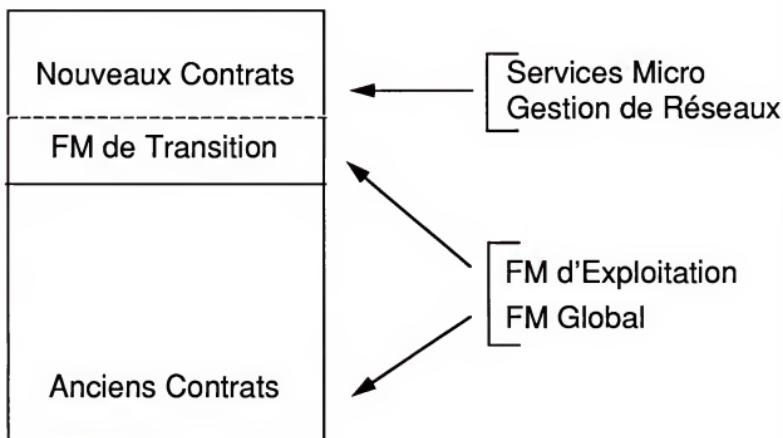


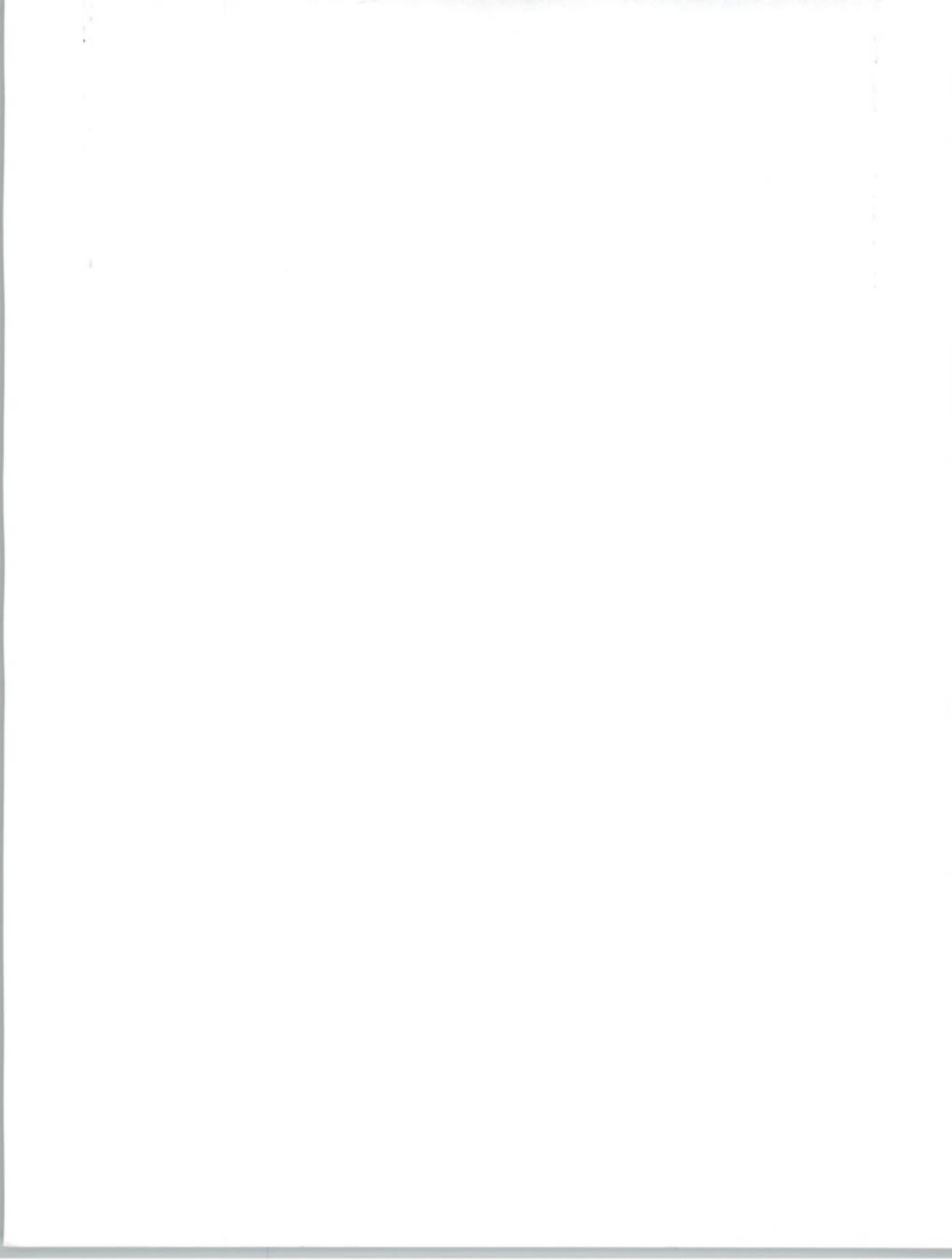
Le FM de Transition

- Prestataire = vecteur du changement
- Transition complexe
- Transition longue
- Maintenir en parallèle deux environnements



Nature des Contrats D'Outsourcing 1993





Les Services Micros

Caractéristiques des Prestations

Types de Services	Nature des Prestations
Support d'Intégration	Conseil/organisation/choix technologiques
	Conception d'architecture, développement, migration
Support Connectivité et Accès Données	Sécurité Réseau



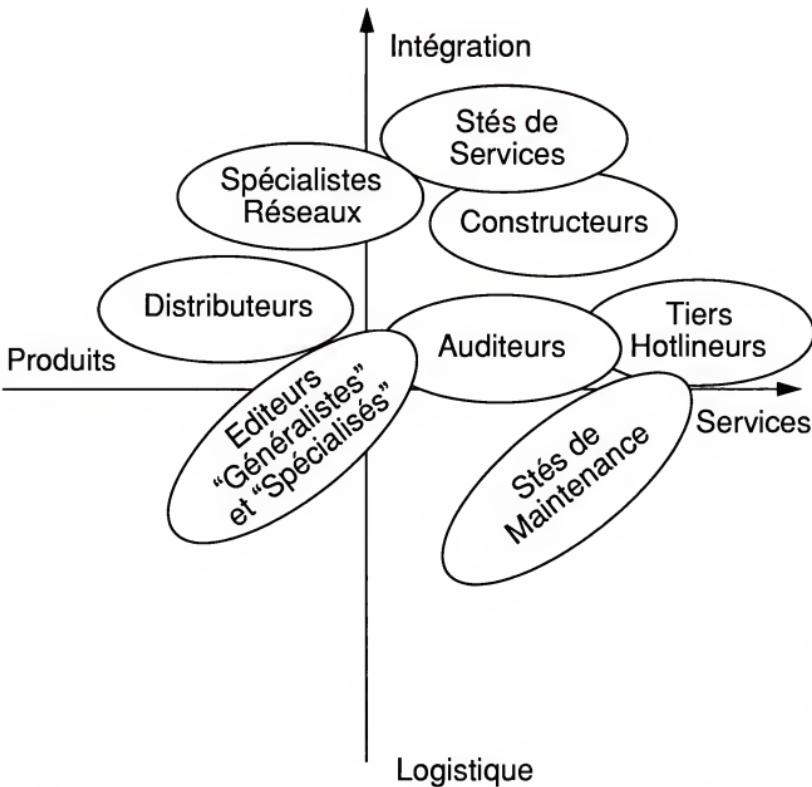
Les Services Micros

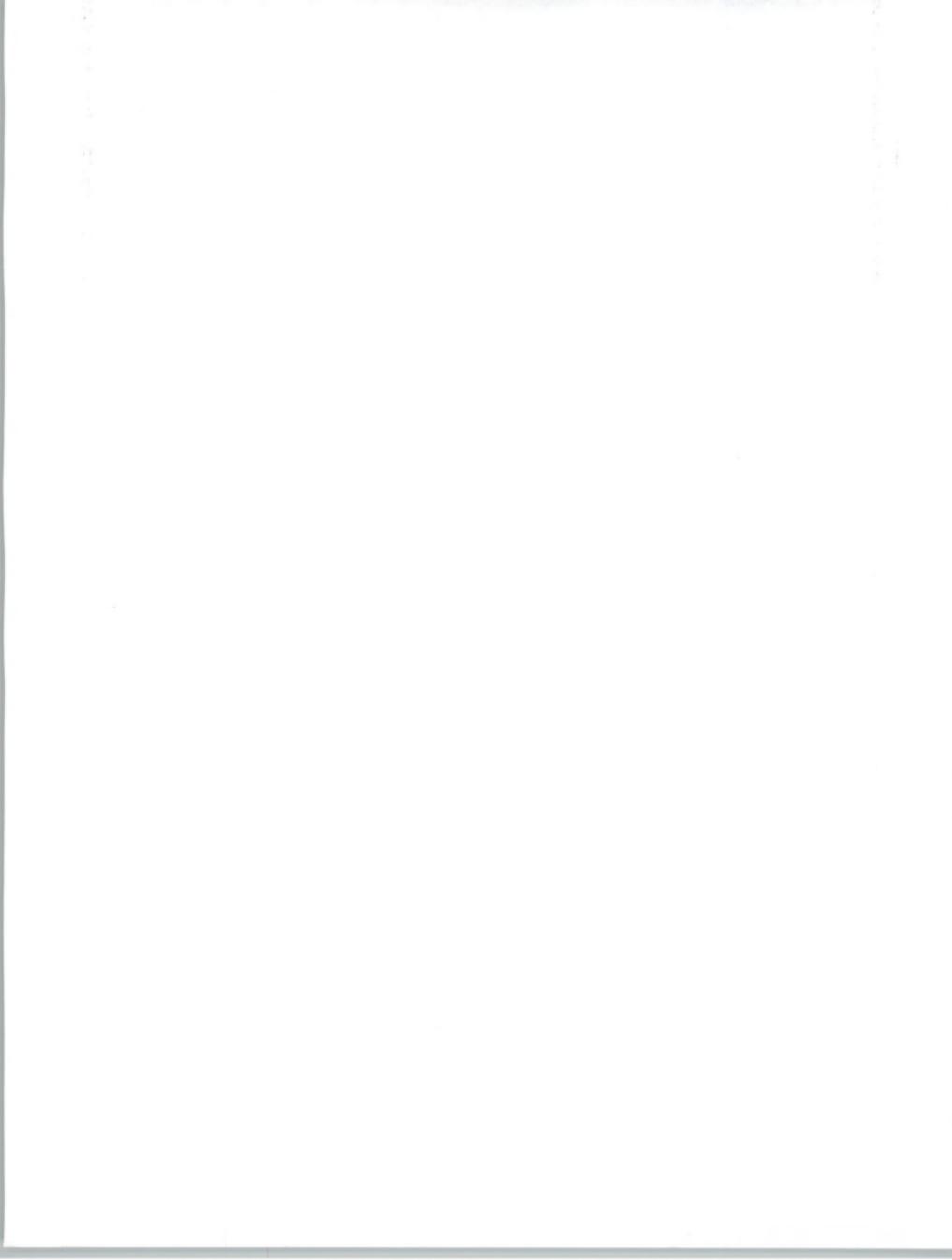
Caractéristiques des Prestations

Types de Services	Nature des Prestations
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Support Utilisateur	Hotline Formation



Positionnement des Catégories de Fournisseurs sur le Marché



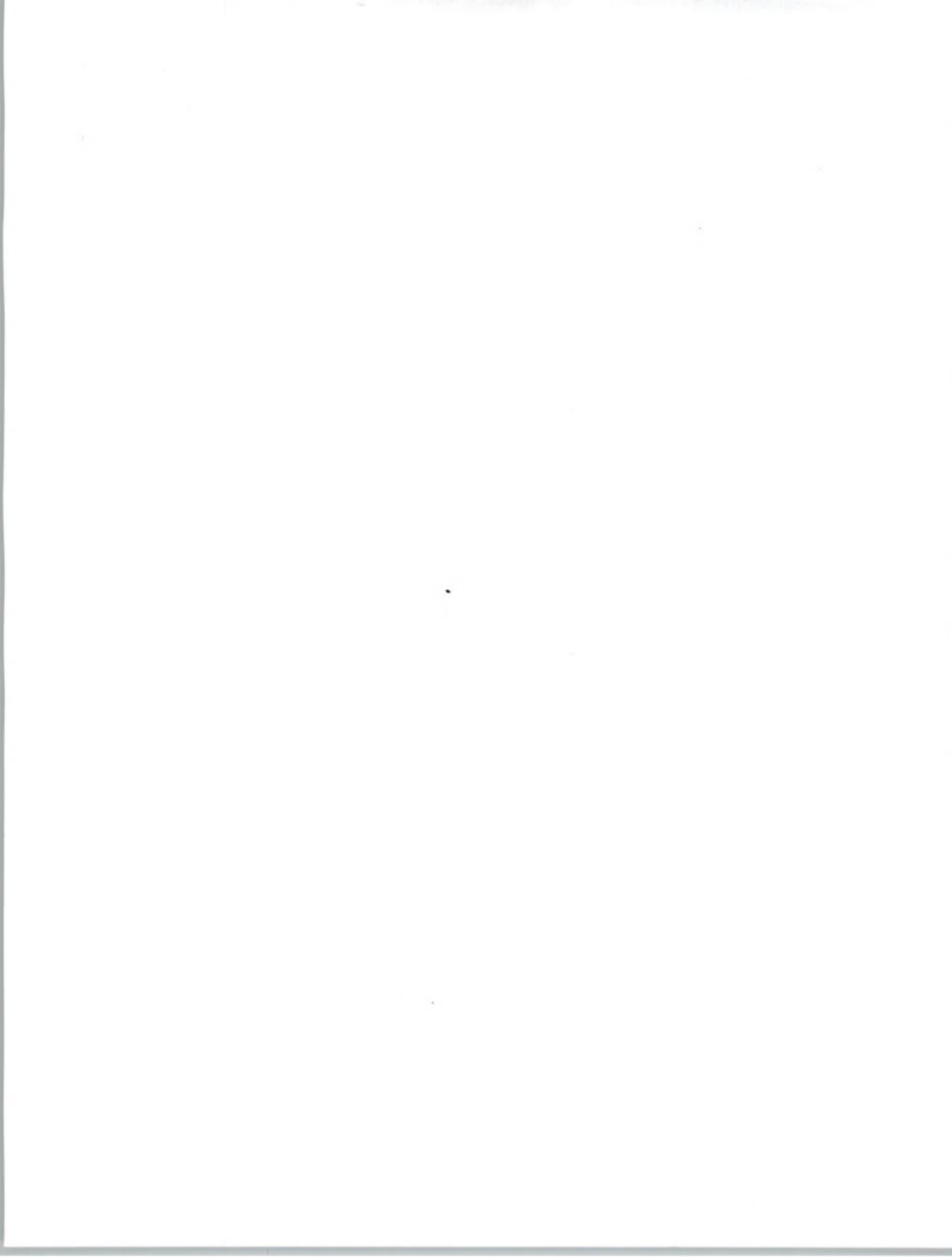


Business Operations

Définition du “FM de Fonction”

Prise en charge par un prestataire externe d'une fonction essentielle de l'entreprise et du système d'information correspondant

- Système de Facturation
- Service Client
- Gestion des documents
- Traitement des réclamations



Business Operations - “FM de Fonction”

Caractéristiques des fonctions à privilégier

- Communes à plusieurs entreprises
- A dominante humaine
- A forte teneur technologique
- Activité fluctuante



Conclusion

Stratégies d'Outsourcing

Actuelles

- Economies
- Amélioration du service

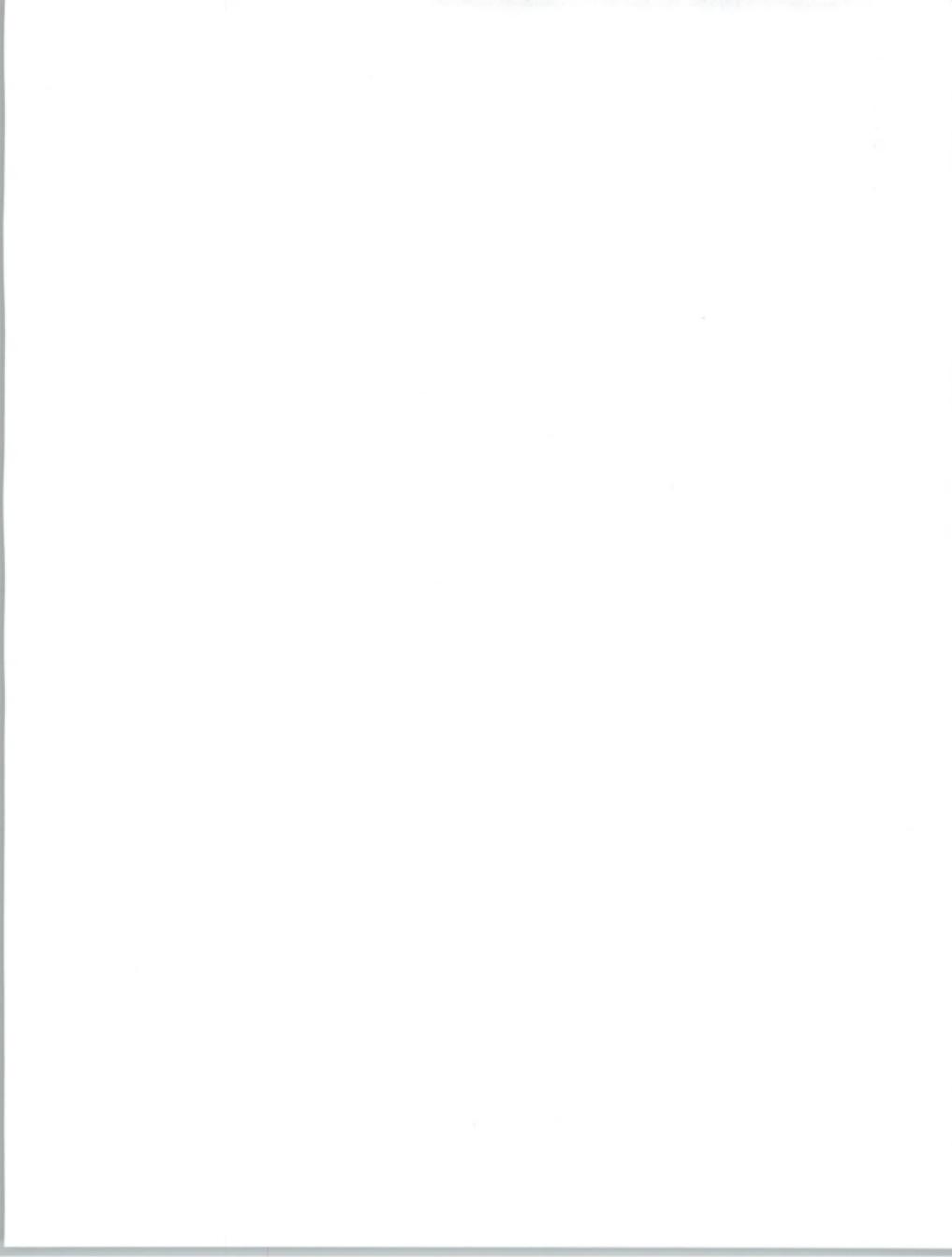
Nouvelles

- Vecteur du changement
- Stratégie d'entreprise
- Transition



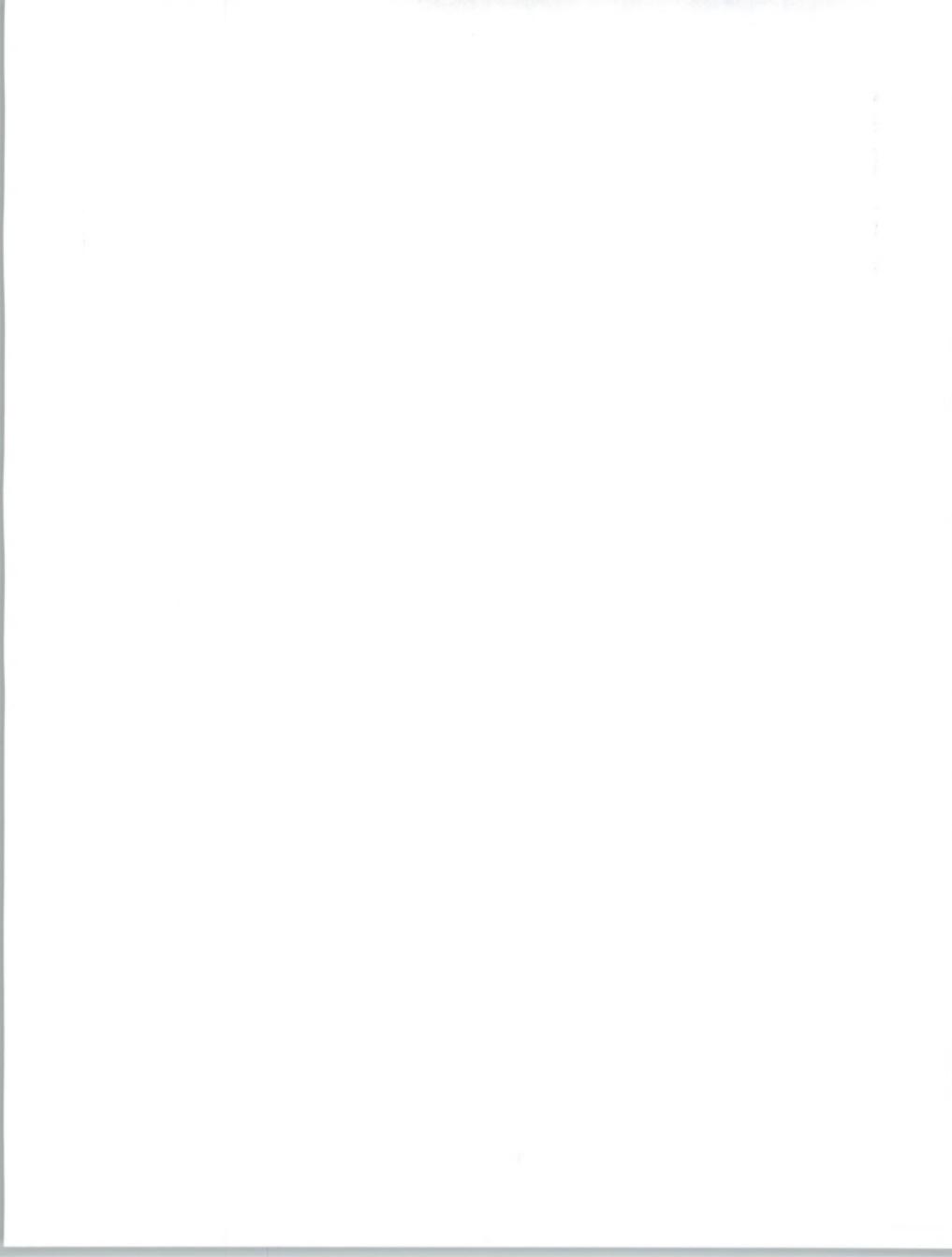
Outsourcing Market Trends

**Sylvie Bénech
INPUT Director**



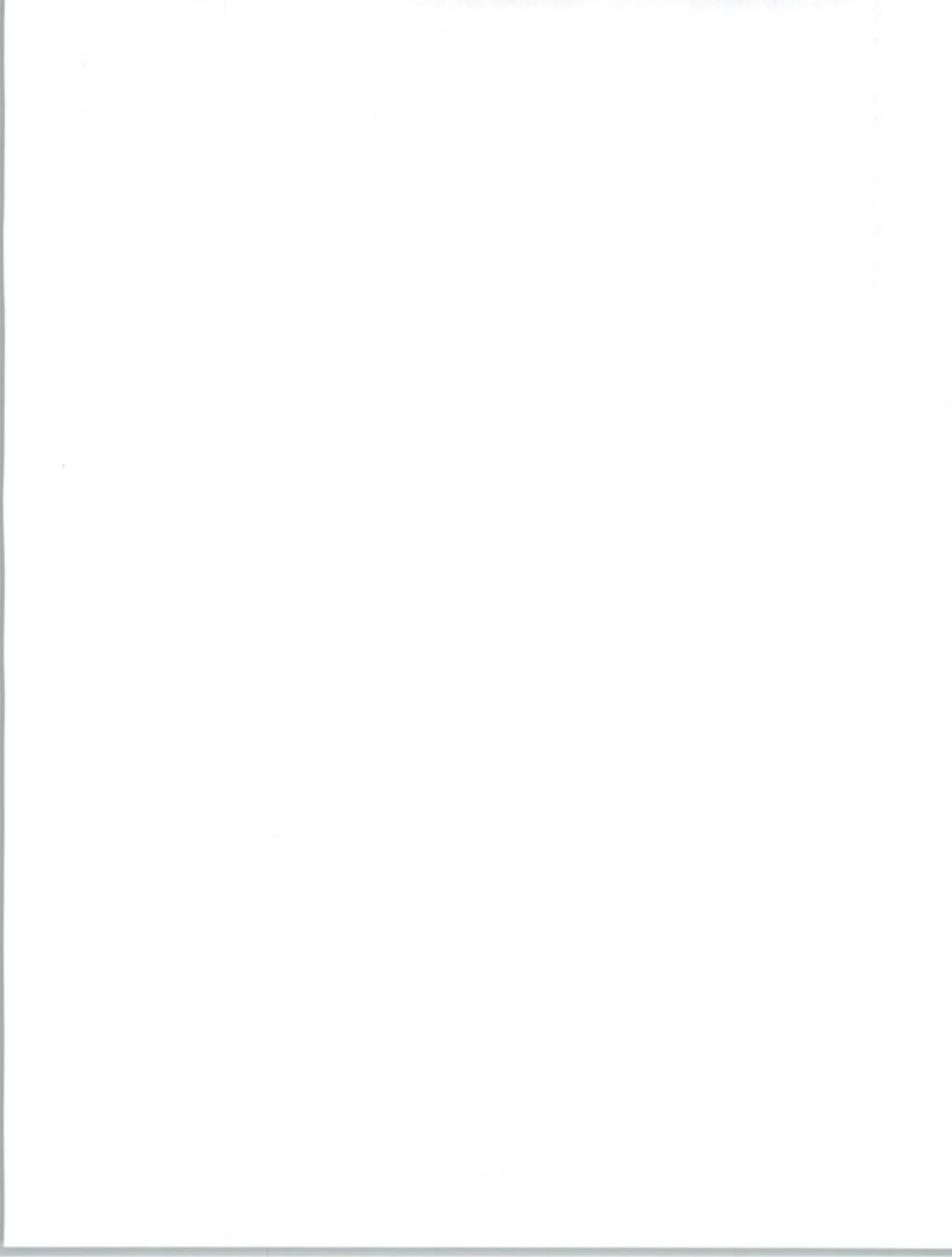
Outsourcing

Current and future market outline



Outsourcing

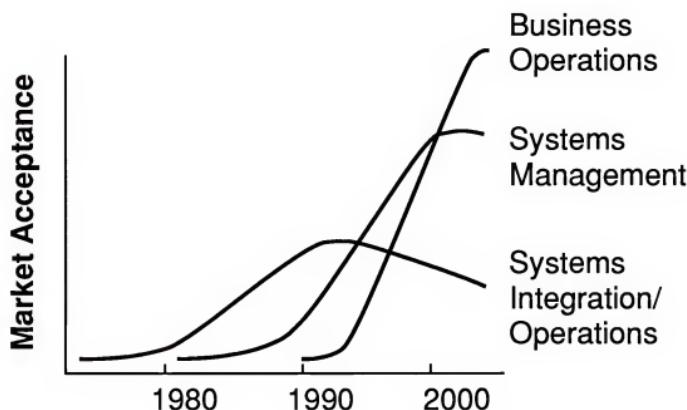
- Outsourcing evolution
- New niches

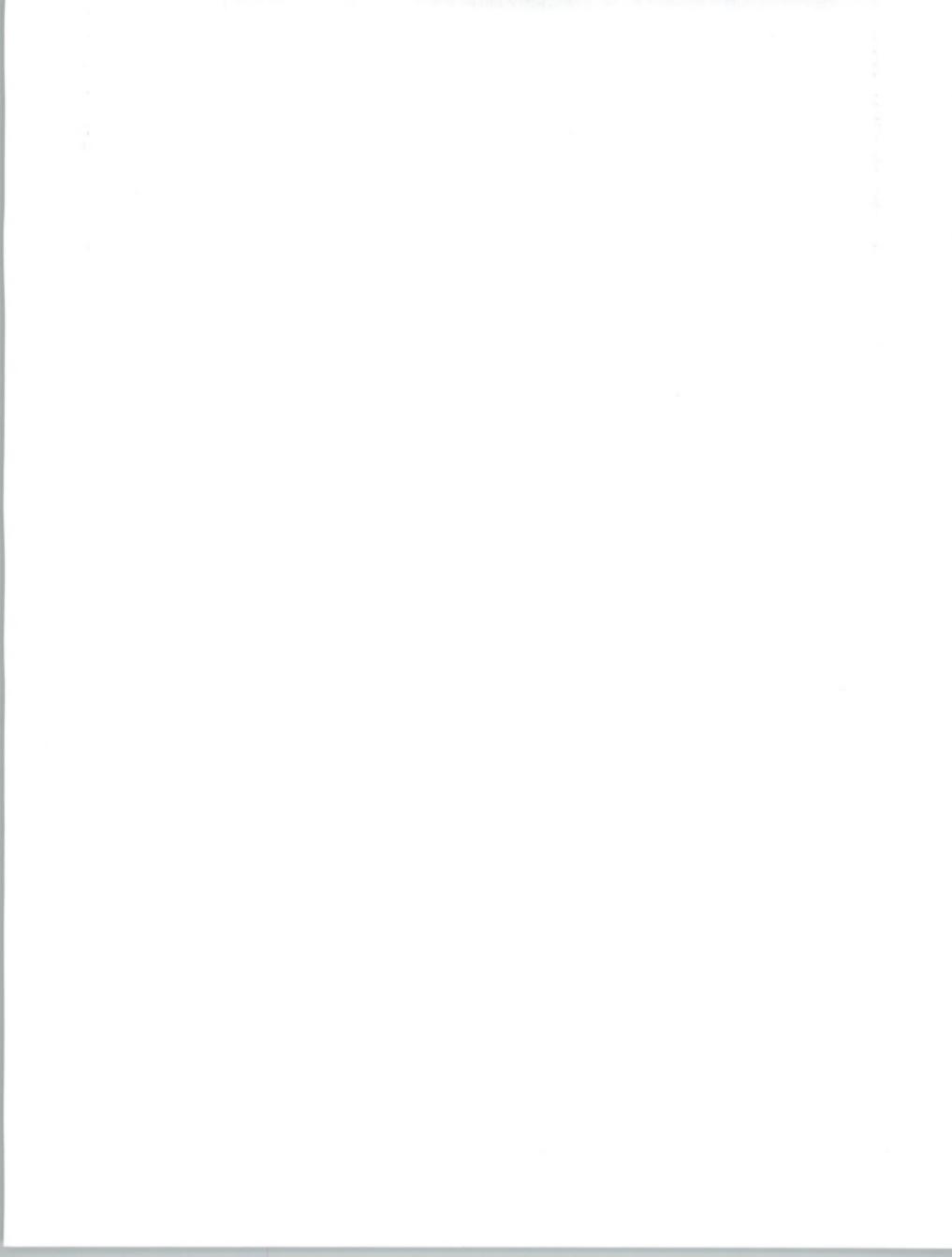


**Outsourcing
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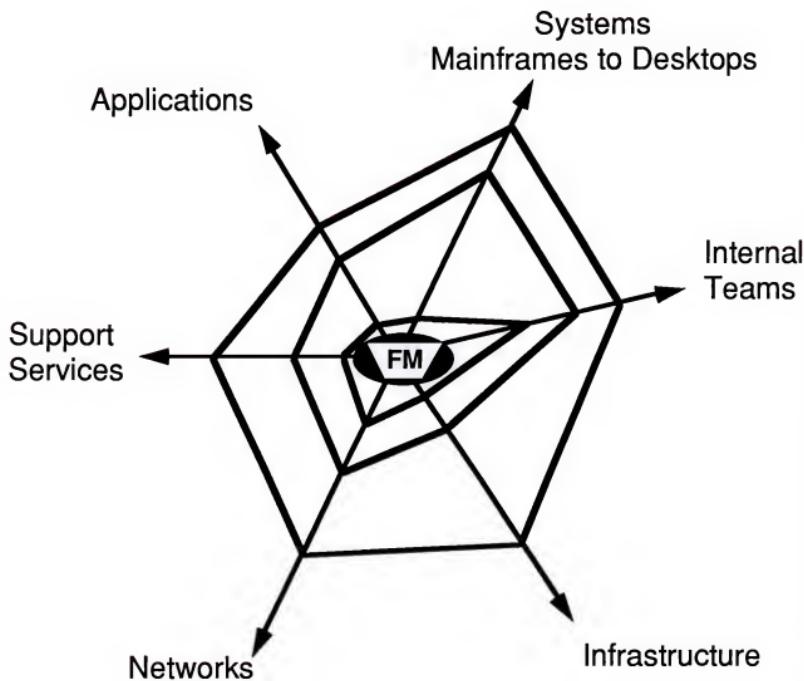


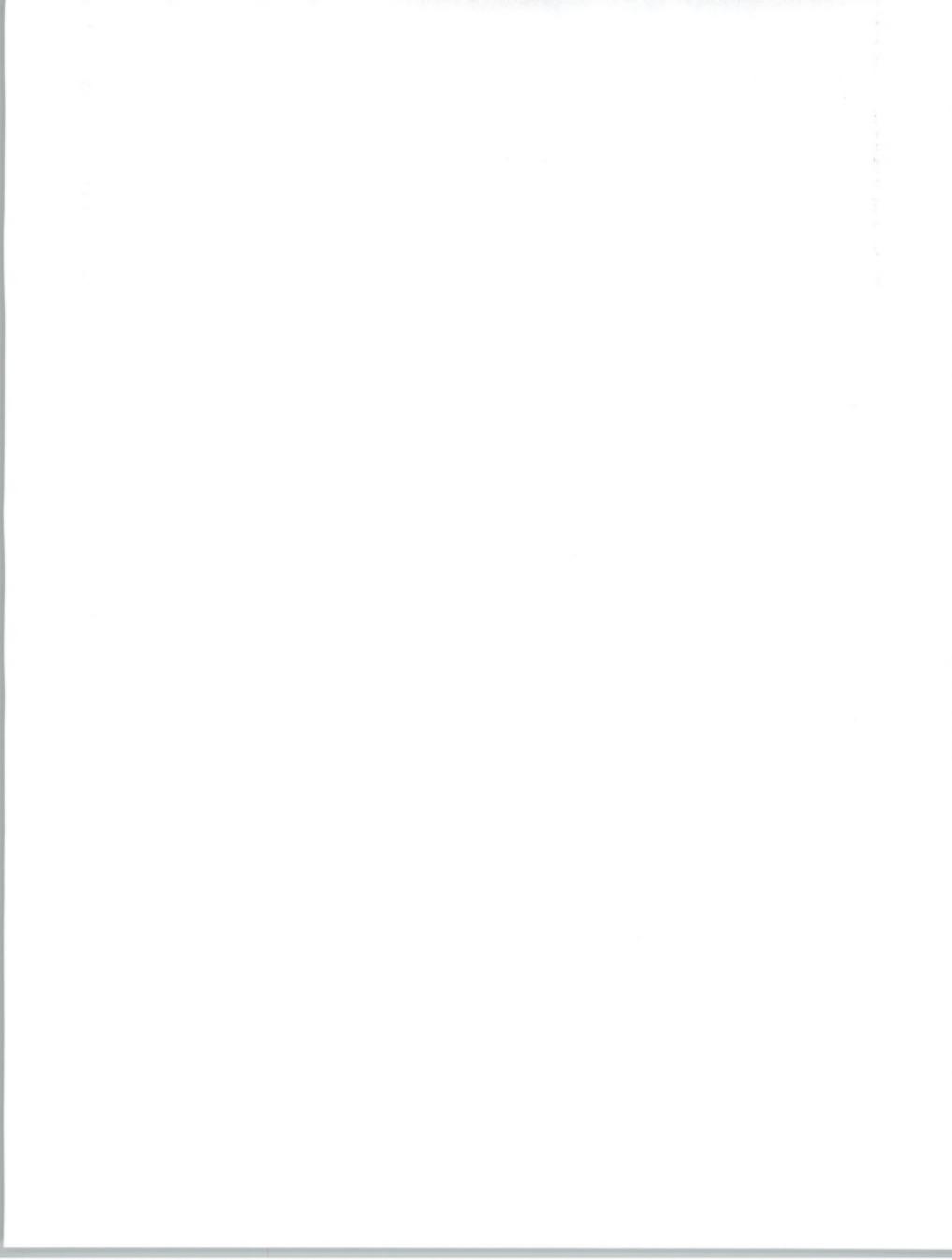
Outsourcing Market Waves



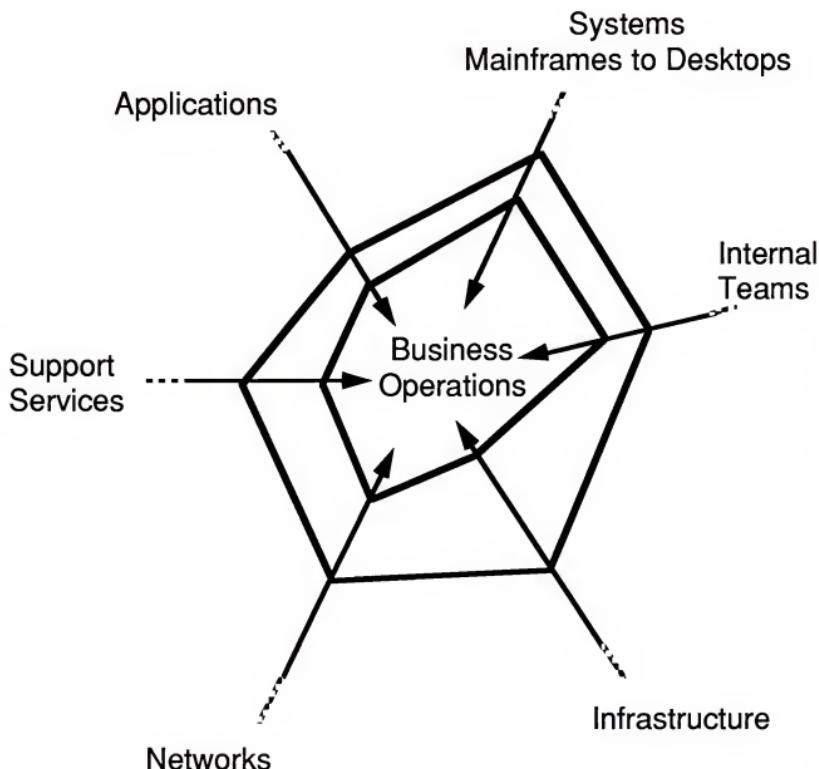


Outsourcing: A Swing-Wing Concept





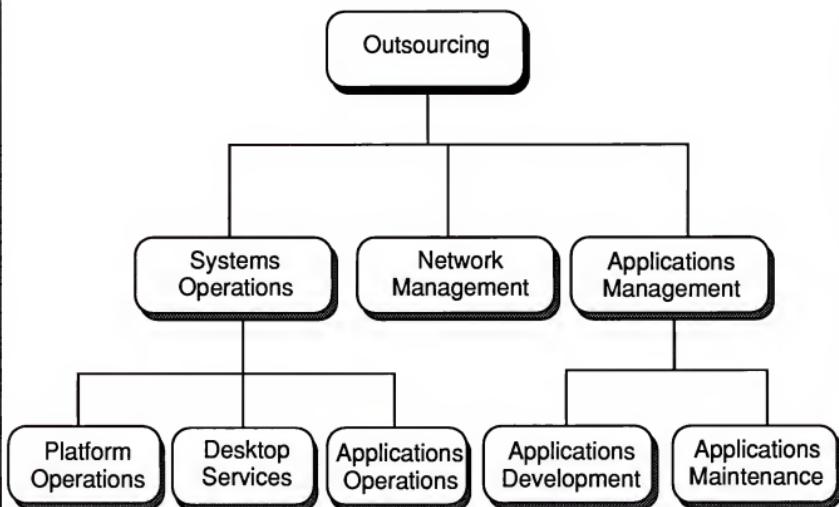
Business Operations Outsourcing

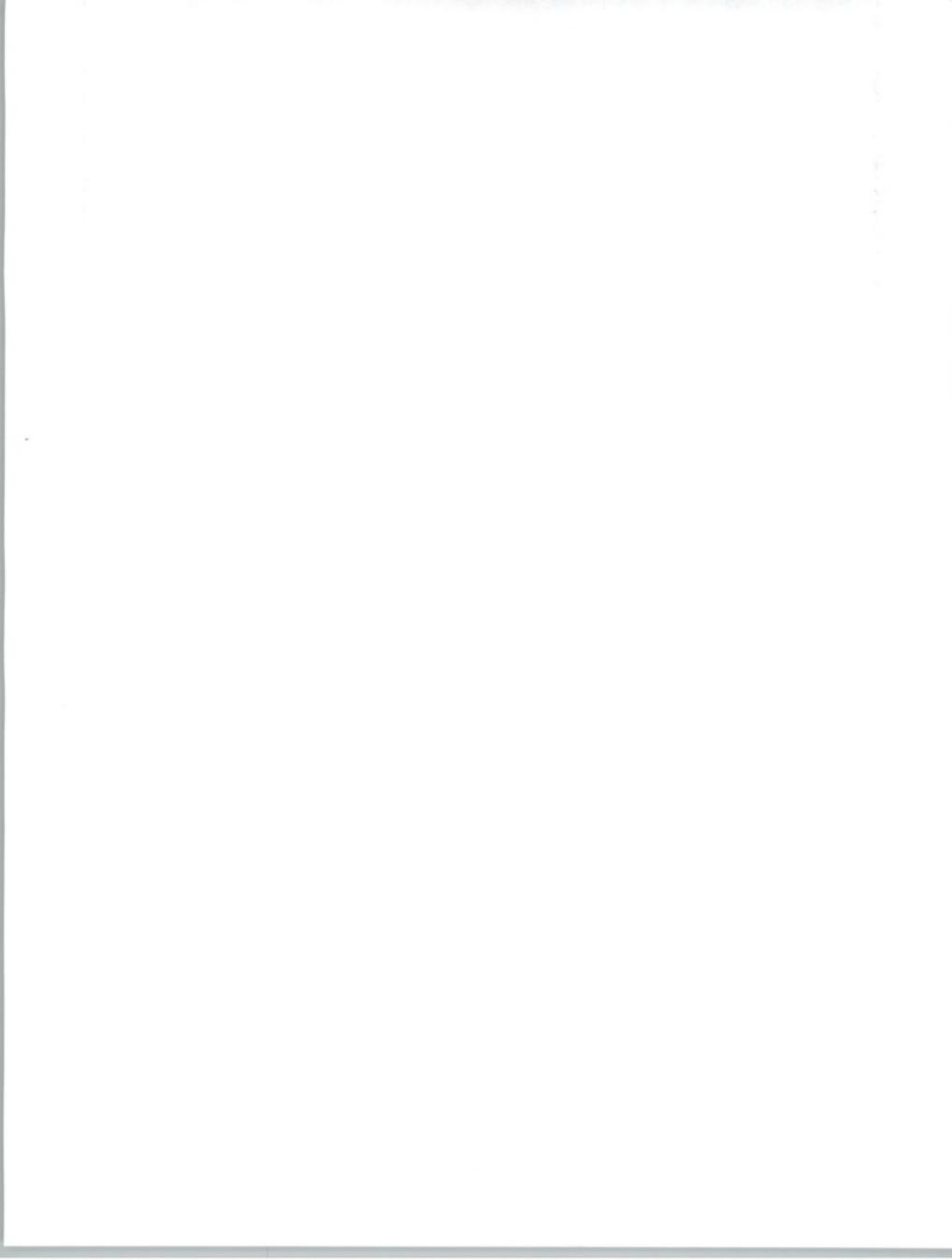




Outsourcing Components

INPUT's View





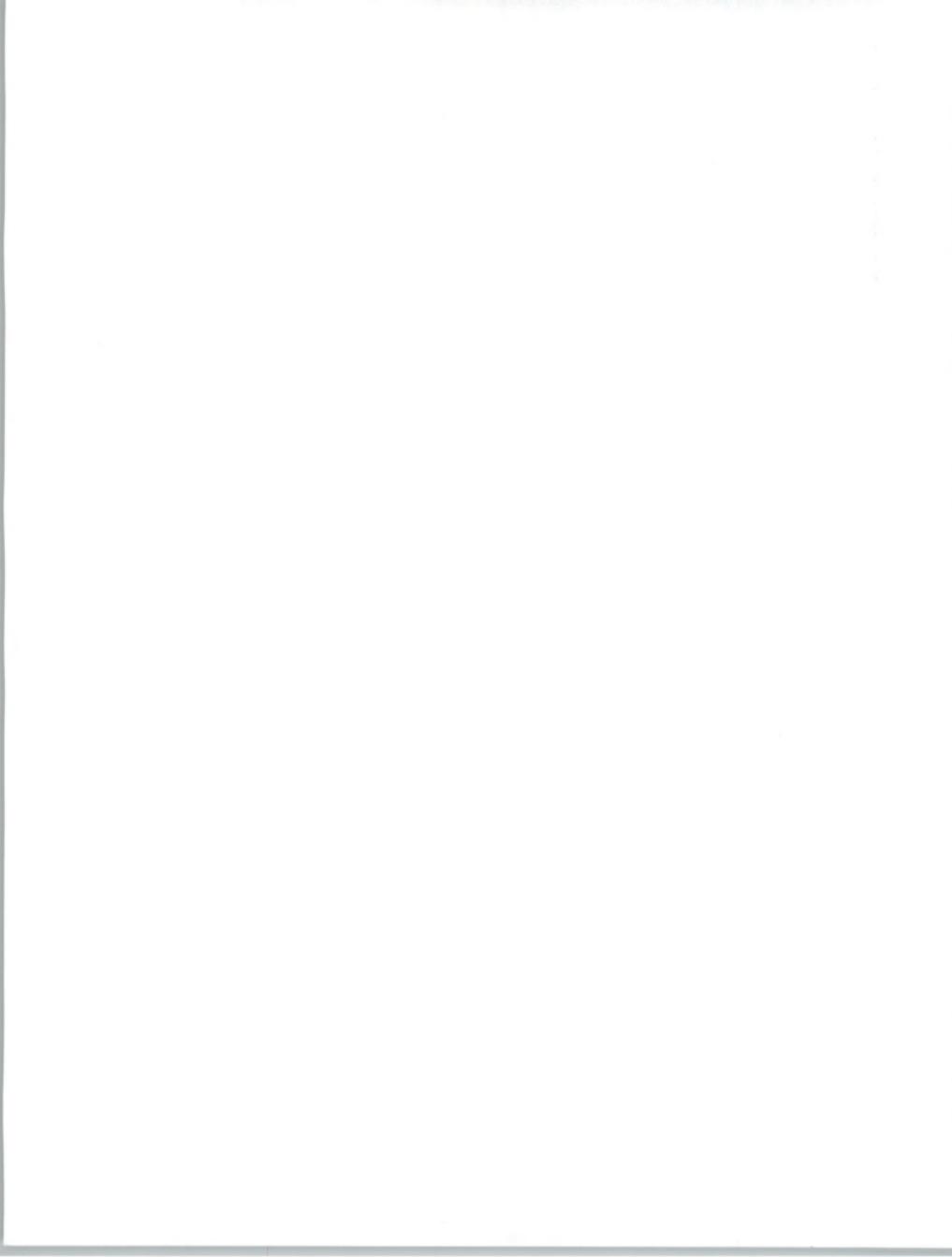
New Niches

- Transition management
- Desktop services
- Business operations

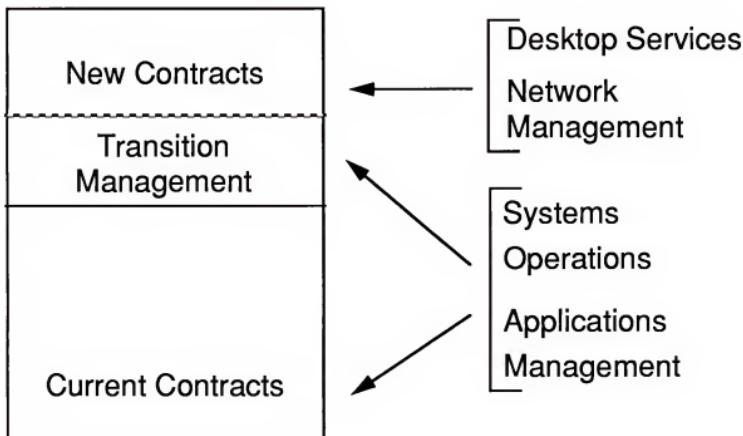


Transition Management

- Requires outsourcer as agent of change
- Transition difficult to accomplish
- Transition takes time
- Dual operational environments required



Outsourcing Contracts 1993 Analysis





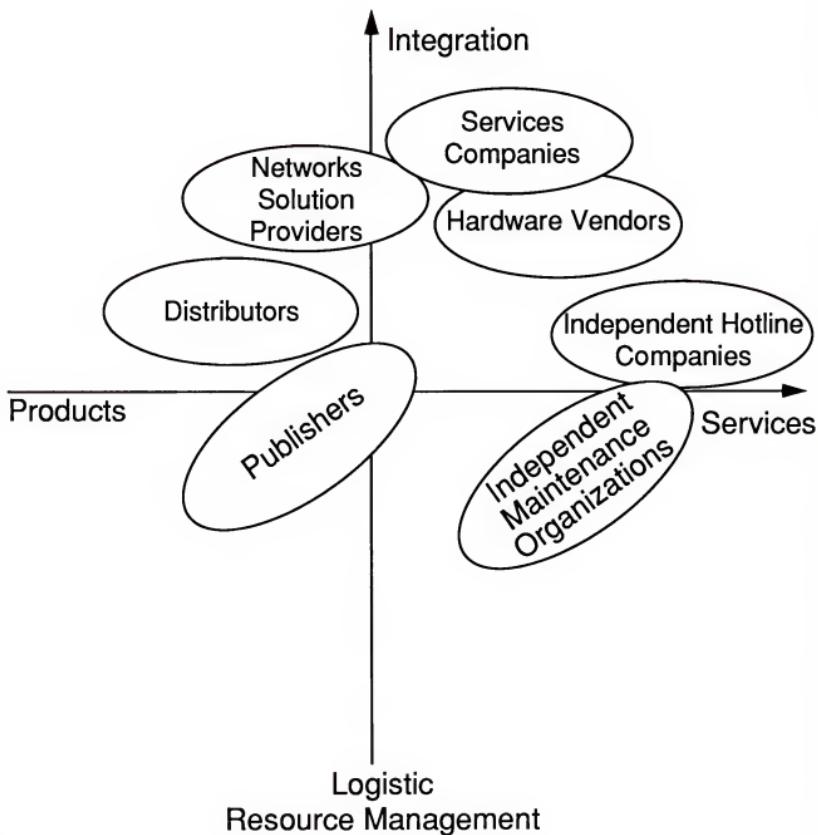
Desktop Services

Services Offerings

Integration Services	Consultancy/Organisational Audit Purchase Advisory
Network Support	Security, LAN Management
Logistic Resource Management	Financial Services Installation Maintenance Fleet Management
End-User Support	Help Desk User Training



Vendor Positioning



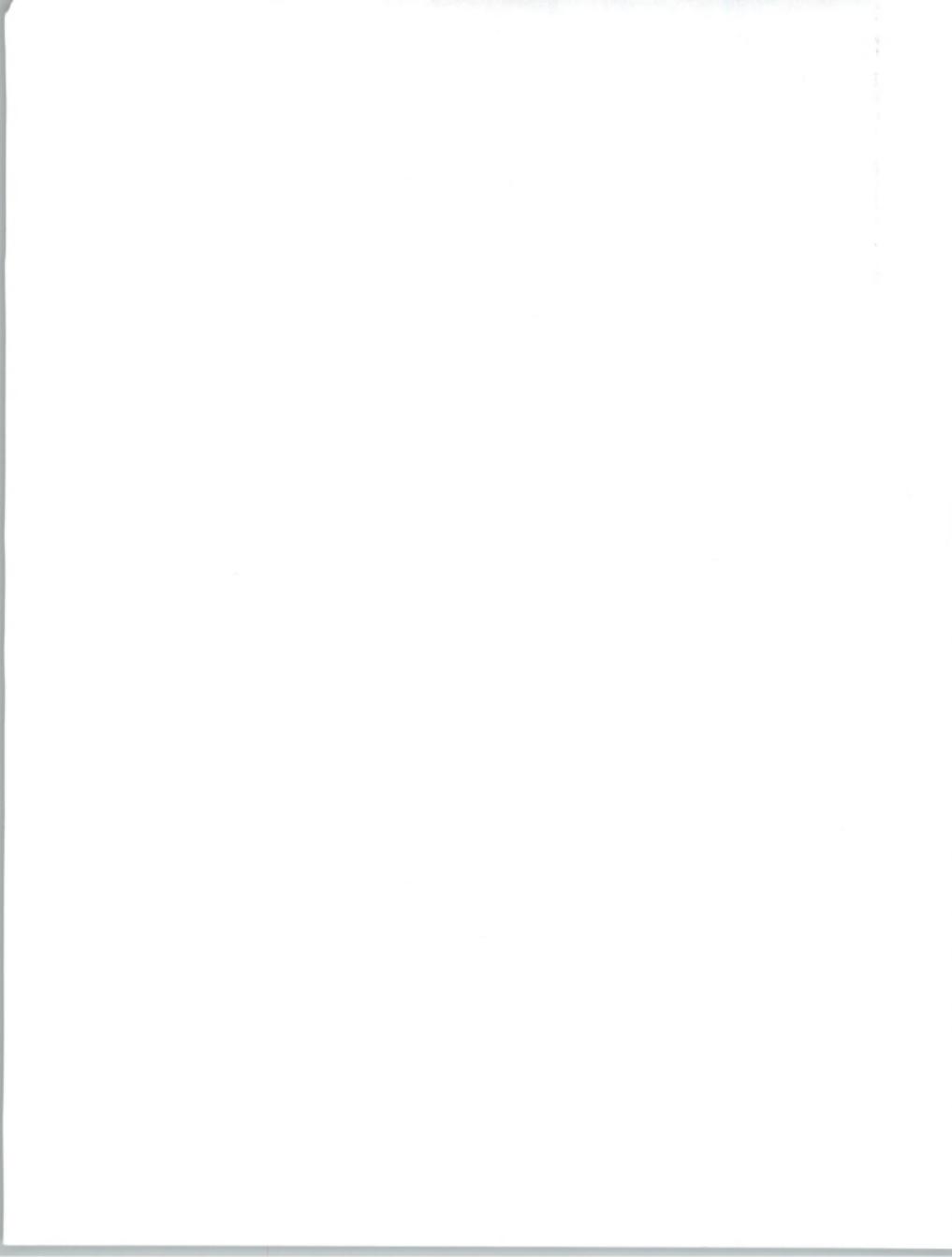


“Business Operations”

Definition

Turning over key business functions and related processes including information systems to outside companies

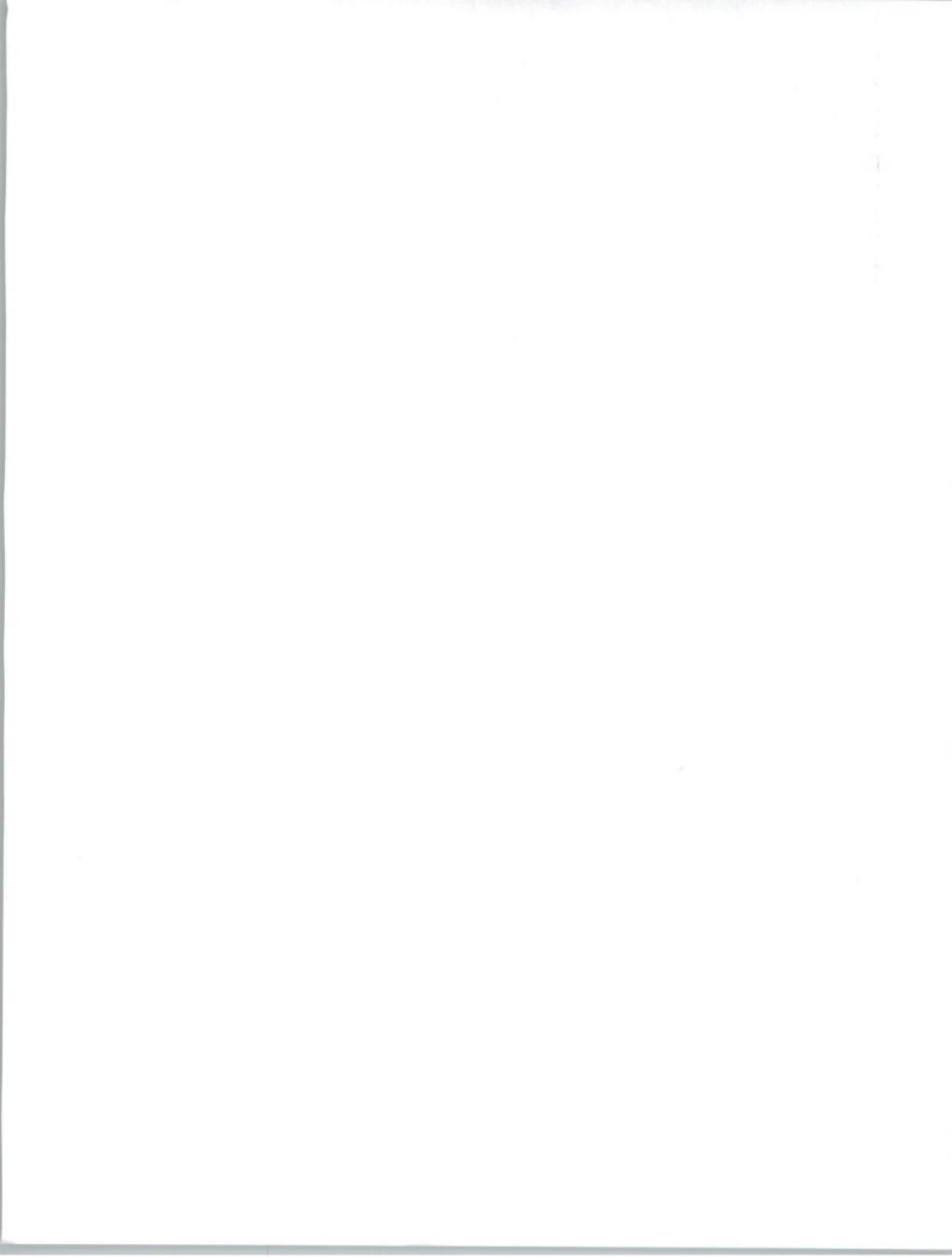
- Billing operations
- Customer service
- Document management
- Customer claims management



Business Operations Outsourcing

Key candidates characteristics

- Labor-intensive
- High technology content
- Common to client's industry
- Periodic peak processing required



Conclusions

Outsourcing Strategies

Current

- Economic strategies
- Service enhancement

New

- Change agent
- Business strategy
- Transition

